FDC Status Report Dashboard
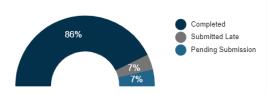
Click on the various statistics or dials to view the supporting information within your agency's Smartsheet Florida PALM Workbook.

Reporting Period

November - December 2023

Agency Sponsor

Mark Tallent

Readiness Workplan Tasks

86%

7%
7%

● Completed
● Submitted Late
● Pending Submission

The Readiness Workplan Tasks dial reflects the timeliness of your agency's submission of all RW tasks to date.

Readiness Workplan Tasks:

Total Tasks = 14

• Completed = 12

• Submitted Late = 1

• Pending Submission = 1

RW Tasks - Completed or Open Items

Critical Operational Element	Task ID	Task Name	Task Planned Start Date (dates subject to change)	Task Planned End Date (dates subject to change)	Agency Reported Task Progress	Agency Completion Date	Status Comment
People	328	Document Current Agency Business Processes	07/31/23	12/15/23	75% - Consolidating/Inputting Information for Submission		
N/A	500	Create Agency Specific Project Charter	10/02/23	12/15/23	100% - Completed in Requested Format	10/27/23	
N/A	501	Create Agency Specific Implementation Schedule	10/09/23	12/15/23	100% - Completed in Requested Format	12/10/23	OWP was attached.
N/A	502	Create Agency Specific Risks and Issues Management Plan	10/09/23	12/15/23	100% - Completed in Requested Format	12/10/23	OWP was attached.
People	503	Create Workforce Readiness Plan	10/16/23	12/15/23	100% - Completed in Requested Format	12/10/23	OWP was attached.
Technology	504	Update Agency Business System Documentation for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/04/24	
Technology	505	Update Florida PALM Interface Inventory for Segment I	10/30/23	01/12/24	100% - Completed in Requested Format	01/04/24	
N/A	506	Submit Bimonthly Agency Readiness Status Report	11/01/23	11/13/23	100% - Completed in Requested Format	11/12/23	
N/A	507	Manage Agency Specific Implementation Schedule, Risks and Issues	11/01/23	12/27/23	100% - Completed in Requested Format	12/27/23	
N/A	509	Submit Bimonthly Agency Readiness Status Report	12/28/23	01/12/24	100% - Completed in Requested Format	01/03/24	

People	Processes	Technology	Data
The staff and stakeholders affected by your agency's transition to Florida PALM.	The sequence of procedures to accomplish a business objective.	The applications or tools used to process, track, or report on financial operations.	Information used in or produced from an agency's financial business operations.

The dials below include an intuitive Green-Yellow-Red spectrum, where green indicates the measure is in a positive range, yellow represents that the gaps in expected results present an increasing risk to the agency, and red indicates that there are significant gaps in expected results that present an elevated risk level for the agency.

Change Champion Network:

• Unique Filled Role = 10

• Duplicate Filled Role = 4

• Vacant Role = 0

The Change Champion Network dial reflects the completeness of your CCN makeup.

Participation:

• Meetings Attended = 4

• Meetings Missed = 0

The Participation dial reflects your agency's attendance at Project-led meetings.

Implementation:

• Training = TBD

Current-State:

Cataloged Business Processes = 263

• Related Business Systems = 12

• Related Reports = 58

• **Documentation Status:**

- Complete = 139 Partial = 91 Not Started = 33

Implementation:

• Role Mapping = TBD

Current-State:

Cataloged Business Systems = 26

• **Criticality:**

- High = 10 Med = 5 Low = 5 None = 6

• **Documentation Status:**

- Complete = 13 Partial = 8 Not Started = 5

Cataloged Interfaces = 33

- Inbound Interfaces = 30

- Outbound Interfaces = 3

Implementation:

Business Systems Planned for Integration = 12

• **Segment I - Documentation Updates:**

- Complete = 0 Updating = 0 Evaluating = 0 Not Started = 0 Not Needed = 12

• **Segment II - Documentation Updates: TBD**

• **Segment III - Documentation Updates: TBD**

• **Segment IV - Documentation Updates: TBD**

Planned Interfaces = 1

- Inbound Interfaces = 0

- Outbound Interfaces = 1

- Spreadsheet Uploads = 0

Current-State:

Unique FLAIR Data Elements = 73

• **Associated Unique Uses = 222**

- Continued Use - Yes = 183

- Continued Use - No = 10

• **Associated Business Systems = 2**

Cataloged Reports = 233

• **Criticality:**

- High = 210 Med = 11 Low = 2 None = 11

Implementation:

• Conversions = TBD

• Configurations = TBD

Agency Reported

The Risks, Issues, Assumptions and Readiness Activities tables below display only items that were opened/logged, closed/resolved or active during the reporting period.

FDC Risks

Critical Operational Elements	Risk Description	Status	Risk Rating	Mitigation/Response Strategy	Reporting Period Comments or Updates	Date of Status Change	Owner / Coordinator
People Processes Technology	1077 - Funding for PM staff augmentation	Open	6 (High/Medium)	Funding request approved by OPB – hiring currently in process	Funding request approved by OPB – hiring currently in process	12/01/23	Greg Prescott, OIT
People Processes Technology	1074 – OIT Resource Capacity Technical FTEs	Open	3 (High/Low)	Staff Augmentation required due to current capacity	FDC has implemented an OIT Governance Process to manage all IT Projects and assign resources based upon capacity. The PALM-FDC Project has been approved by Governance. The risk rating improved from 6 to 3.	09/20/23	Greg Prescott, OIT

FDC Issues

Critical Operational Elements	Issue Description	Status	Priority	Resolution Plan	Reporting Period Comments or Updates	Planned or Actual Resolution Date	Owner / Coordinator
People Processes Technology	Do not have a permanent Project Manager or backup Project Manager	Open	Critical - Impacts the ability of the agency to move forward with work without resolution	To access the available Administered Funds to support the PALM Project and readiness activities	The Planned or Actual Resolution Date has been extended to 01/31/24 to allow time for staff to be hired, as the process has been initiated.	01/31/24	OIT
People Processes Technology	Not having a backup for newly created agency business systems	Open	High - Impacts the ability of the agency to meet deadlines or milestones	Crosstrain staff to ensure adequate backup	The Planned or Actual Resolution Date is extended to 06/30/2025 to provide 6 months of readiness prior to the current Project Production date – January 2026.	06/30/25	David Eskin, Finance and Accounting/Systems Reporting

FDC Assumptions

Critical Operational Elements	Assumption	Status	Date Logged or Removed	Impacted Stakeholder(s) and/or System(s)	Reporting Period Comments or Updates
People Processes Technology	The agency will be able to access the available Administered Funds to support readiness activities.	Logged	07/01/23	All agency business systems and PM roles	Due to the overallocation of FDC key subject-matter resources, hiring consultants and other resources to augment the FPST Project is essential for the department's continuity of operations and successful transition to the Florida PALM solution. Hiring currently in process.
People Processes Technology	There will be sufficient engagement by resources knowledgeable about agency business processes and technical capabilities.	Logged	07/31/23	All agency business systems and CCN roles	Organizational Change Management (OCM) Lead was selected 12/19/2023 - pending on a start date.
People Processes Technology	FDC's Change Champion Network will continue to attend workshops, working sessions, meetings, and other forums for collaboration to ensure the continued functionality of inbound and outbound interface points between the two agencies.	Logged	07/31/23	All agency business systems and CCN roles	Currently still relevant.
People Processes Technology	FDC will understand and document our current state technical architecture and business systems and modify to integrate with the financial management solution.	Logged	07/31/23	All agency business systems and CCN roles	Continually updating, as needed.
People Processes Technology	FDC will understand and document our internal processes and modify them where possible to accommodate the financial management solution functionality.	Logged	07/31/23	All agency business systems and CCN roles	Currently still working on Task 328.

FDC Agency-Specific Readiness Activities

Critical Operational Elements	Activity Description	Date(s)	Impacted Stakeholder(s) and/or System(s)	Objective	Reporting Period Comments or Updates
Data	FACTS Agreement File Cleanup	12/19/23	FACTS, Procurement, FMBC, Budget and Finance & Accounting	To reconcile and update inactive vendors and past end dates on Contracts and Leases per a request by DFS, Bureau of Auditing	
People	FL Palm Budget engagement and Task 328	11/14/23	Agency Liaisons, Backup Agency Sponsor, Budget Director, Sharon McNeal, Katie Bellflower, John Kelley	To get the Budget Office more engaged in FL PALM and to discuss Task 328	
People	Task 326 Internal Discussion Meeting	11/16/23	Agency Liaisons	To discuss upcoming CCN meeting and the 8 outstanding task	
People	CCN PALM Monthly Standing Meeting	11/17/23	Agency Sponsors, Agency Liaisons, Project Management Liaison and all identified CCN staff	Monthly standing meeting to discuss where we stand on the project and to engage all CCN staff	
People	Segment II Debriefing Meeting	12/12/23	Agency Sponsors, Agency Liaisons, and all identified CCN staff who attend workshops	Meeting to debrief all December Segment II workshops to discuss what we heard and learned on the project	
People	Enlightenment – FL PALM Quiz (Survey)	12/22/23	All F&A staff & Inmate Grievance	Communication to engage non-supervisory staff	
Processes	Continuous updates to our current-state desktop procedures library	12/31/23	Business Process owners throughout Finance & Accounting	To ensure our current state desktop procedures library is up to date.	Ongoing
Processes	Review of posted RFQ and funding to obtain consulting services	11/29/23	Bureau of Finance and Accounting as Contract Manager	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology involved in the operation of the Department's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	Funding was approved and approval to move forward on 11/7/2023. Started the process for completion of the PO on 11/29/2023. Error occurred on 12/04/2023 and waiting for the issue to be resolved.
Processes	Continuous documentation of our current state reports, agency business systems, and interfaces.	12/31/23	All business process owners in Finance and Accounting, Budget, Division of Administration, FMBC, Procurement, HR	To document our current state	Ongoing
Technology	Review of posted RFQ and funding to obtain consulting services	11/29/23	Office of Information Technology and F&A	Inventory, catalog, and comprehensively document all existing business roles, business processes, and business technology	Funding was approved and approval to move forward on 11/7/2023. Started the process for completion of the PO on

to obtain consulting services	Technology and F&A	all existing business roles, business processes, and business technology involved in the operation of the Department's Office of Budget & Financial Management (Accounting, Budget, Disbursements, Finance, Revenue, and Reporting functions). Analyze the functionality that will be delivered by Florida PALM during the Financials/Payroll Waves (TBD) and the Florida PALM Expansion Wave (TBD) and determine what gaps, if any, exist between functions the Department currently maintains, and the functionality provided by Florida PALM during each Wave. Create a roadmap to address any identified gaps in functionality.	11/7/2023. Started the process for completion of the PO on 11/29/2023. Error occurred on 12/04/2023 and waiting for the issue to be resolved.

Agency Sponsor Confirmation

As Agency Sponsor, I understand my role and responsibility for monitoring and reporting on my agency's readiness status. I have reviewed and confirmed the accuracy of my agency's readiness status as reflected in this dashboard.

Agency Sponsor Name: *

☐ Confirm *

Submit

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FDC Status Report Confirmation

Reporting Period	Agency Sponsor Name:	Confirmed By:	Confirmation Date:
November - December 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	01/03/24
September - October 2023	Mark Tallent	mark.tallent@fdc.myflorida.com	11/08/23
July - August 2023	Mark Tallent	mary.quinsey@fdc.myflorida.com	09/08/23